

Catholic Charities, Diocese of Winona
Site Visit Programmatic Questions
June 17, 2015

1. Review of Work Plan and most recent Update Report

- Are there any questions about the Update Report form? No
- Are the report counts within 10% of the Work Plan counts (or higher)? Yes
- Are revisions to the Work Plan necessary or anticipated in the future? No

2. Compliance with Necessary Services Policy

- What intake form are you using to conduct the Necessary Services assessment? – A copy of the intake form was provided and as in compliance with the Necessary Services policy.
- Are there any questions regarding the collection of information for the Demographic Report form? No
- Are there any questions regarding the reporting of information on the Demographic Report form? No

3. Review of compliance

- Guidelines – any questions?
 - ✓ Pre-paid cards (revised): Grantee was given the policy on pre-paid cards and it was discussed. Pre-paid cards are now being used.
 - ✓ Submission of materials: Reviewed
 - ✓ Travel (revised): Reviewed
 - ✓ Participants: This policy was reviewed.
 - ✓ Religious content: Grantee does not provide materials with religious content and understands the policy pertaining to religious content.
- New staff orientation – how is this conducted? New staff orientation is provided one-to-one, specific to program work by supervisor and senior staff. Mentoring and “shadowing” experience is provided as needed. Staff is licensed social workers who are required to receive continuing education as part of their certification.
- Budget Form Guidelines: Reviewed
- Strategies review (revised): Reviewed

4. Medical accuracy compliance

- A. How are you assuring medical information distributed by or available at your organization is medically accurate? The only medical information provided is the MDH booklet “If You Are Pregnant: Information on Fetal Development, Abortion and Alternatives”.
- B. Does your organization provide any medical services? No

5. Is grantee in compliance with contract agreement?

- A. Are all the duties in the Work Plan being fulfilled as described, in the quantities described, by the deadlines described? Yes
- B. Is the grantee in compliance with the Assurances and Agreements? Yes
- C. Have all subcontractor agreements for the contract and evaluation plan been submitted and approved? The plan has been submitted. Sub-contract forms will be sent.

- D. Do volunteers support the grant-funded activity? No
- E. Does the grantee submit media products for review and approval prior to purchase, development or distribution? Yes

6. Financial Review

- A. Review of Year 2 Expenditures/Year 2 Budget, as needed: Year 2 budget has been submitted.
- B. Follow-up of grantees with elevated risk: Not applicable
- C. Financial Reconciliation; review of findings (if FR has taken place): Financial Reconciliation has not taken place but will be scheduled this year.

D. Invoices

- Are there any concerns regarding invoices? (timing, signatures, etc.): No
- Are there any issues to discuss regarding the invoice verifications? No

7. Evaluation Plan Update

- How is evaluation project progressing? Very well. Two outcomes are being reviewed: safe sleep and financial literacy. This is a continuing study and will encompass 20 months of evaluation once completed.
- Is participation meeting expectations? Yes; there is 100% participation among clients involved in the financial literacy program.
- Are there any concerns regarding responses or progress reports? No
- Are budget revisions necessary? No

8. Review of Positive Alternatives web site

The PA website description of this grantee will be looked at by Valerie and corrections will be sent.

9. Grant Agreement Amendment?

- Have there been any changes to your 2012-16 grant application Face Sheet information? No
- Do you anticipate any changes prior to June, 2015? No

10. Budget discussions: The anticipated guidelines for the upcoming 2015-16 contract were discussed, as were the ability for grantees to carry-over their unspent 2015 funds. Information was given to both the Executive Director and Clinical Counseling Director.

11. Issues specific to this grantee: None

12. Tour of Facility

This grantee provides services from seven offices across the southern tier of the state. The Winona site where we met is only one of these locations. Staff frequently travels off-site in order to ensure privacy or facilitate meeting arrangements with clients.

13. How can MDH be more supportive of your program? Valerie initiated a discussion regarding the evaluation program and its requirements. Ideas for the promotion of their continuing programs were discussed. Also, the idea of a future scholarship type program was discussed by Valerie.

14. The geographic area served by the Catholic Charities, Diocese of Winona with Positive Alternatives funding covers more square mileage than any grantee, with the exception of the grantee that provides statewide service. Utilizing offices in seven cities, three social workers serve the two tiers of southern counties, offering parenting and adoption education and information along with a 24 hour crisis hotline to answer questions and give support. Using

their own (not grant) funds, Catholic Charities also provides financial assistance for rent, utility and other emergency expenses pregnant and parenting women face. "Financial literacy" is an aspect of the parenting education program, as are safe sleep, child safety and self-sufficiency. The organization is also initiating a "Nurturing Healthy Families" program which began in 2014 to help offer monthly educational and supportive meetings for clients involved in their program. The number of clients being served in the program has increased since the beginning of the grant and now significantly exceeds the number the organization contracted with MDH to serve. Catholic Charities of Winona has managed their funding well and continues to offer quality services to an expansive rural community.